UPGRADE INSTRUCTIONS
MUNIS Major Release 2003 and
MUNIS Maintenance Release 2003.01
Please Review Immediately!!!
October 27, 2003

The necessary programs and scripts to install MUNIS 2003 and 2003.01 will reside on your district's system for installation. These upgrades must be installed prior to the OPEHI (Health Insurance) critical release to be distributed within the next few weeks. The upgrade includes the MUREFRESH and MUCOPY utilities, to allow you to refresh your production and test databases.

PLEASE REMEMBER…. This is a cumulative release of the Major Release 2003 and Maintenance Release 01. After the Major Release is complete, continue adding the 2003.01 Maintenance Release as prompted. There will be an appearance that the release is being run twice.

Preparing to install Major Release 2003 and Maintenance Release 2003.01.

The following steps should be performed and/or reviewed prior to installing 2003/2003.01.

1. **Each MUNIS user must have their workstation IP address in the UNIX "host file".** Failure to do so will prevent users from accessing MUNIS after the release has been installed. REFER TO SECTION **Adding a Workstation to the Host on the RS6000** LOCATED AT THE END OF THIS DOCUMENT.

2. **Before proceeding,** all MUNIS clients **should read AND COMPLETE THE APPLICABLE SECTIONS IN the entire "Of Special Interest" document (available on the KDE website); specifically sections:**
    - Workflow & Related Requirements-**MANDATORY FOR REQUISITIONS**
    - Redesign of the System Administration Module
    - Department Codes - Centralized Location

3. For MUNIS clients owning MUNIS Crystal Reports: **While the 2003/2003.01 alter and integrity of MUNIS tables and data will not be compromised, your `dbimport` will not complete successfully until the 2003 version of MUNIS "Database Views" has been loaded. For this reason, we suggest waiting for "Database Views" before proceeding. To obtain a copy go to the Munis web site and download the views.**

Beginning the Major Release 2003 and 2003.01 installation upgrades:

Please make certain the following steps have been completed prior to beginning the upgrade.

1. The "murefresh" utility will export and import your district's database, which will ensure its' integrity. This utility is required to free up any unused space to enhance the performance of the upgrade. *(Instructions for running this utility are outlined BELOW.)*

2. All Payment Entry and Bill Refund Maintenance batches (in Revenue and Billing) must be posted.

3. The status of payroll processing should not be between steps A) PAYROLL STATUS/START/CHANGE and O) G/L DISTRIBUTION JOURNAL/UPD. For example, do not run the GENERATE EARNINGS/DEDUCTIONS program, install this upgrade, and then run EARNINGS/DEDUCTIONS F/M.

4. All journals entered in the GENERAL JOURNAL ENTRY/PROOF, PO ENTRY/PROOF, A/P INVOICE ENTRY PROOF and ENCUMBRANCE JOURNAL ENTRY/PROOF programs must be posted.

5. All requisitions must be a status of either "0" (Converted**),** "1" (Rejected), or "4" (Allocated)**. Requisitions between stages "6" (Released) and "8" (Approved), <u>MUST NOT EXIST</u>. Note: No past approval activity will display for status "0" (Converted) requisitions.**

6. **Verify that no users are logged into the system**.

7. **A backup of your system must be performed**.

8. Print a copy of the menus if they have been customized. Once the new menus are loaded, reinstate the custom changes as required (use printed copy). If you choose not to load the new menus, refer to the section in *Program Enhancements* for all menu changes and additions. **Note: The 2003/2003.01 Major Release introduces significant changes to the menus, therefore MUNIS recommends the menu changes be loaded at the time of the release.**

9. The "murefresh" utility will export and import your district's database, which will ensure its' integrity. This utility is required to free up any unused space to enhance the performance of the upgrade. *(Instructions for running this utility are outlined BELOW.)*

The MUREFRESH Utility

Periodically, the MUNIS database must be "refreshed" to improve performance. This process copies data out of the MUNIS database, then copies it back into the database while recreating the tables. You will need three tapes (new or used) if you are using the tape archive option, or you will need two tapes (new or used) if you will be using the hard drive

archive option. The entire procedure can take from 2 to 6 hours for completion. *__You will
need to be present to monitor the process and replace the tapes when prompted. If any
errors are encountered, write everything down and call School Information Technology
Services at 800-884-1754.__*

The MUREFRESH Utility process does the following:

- ➤ Checks to make sure the user is logged in as "root" and that there are no other users in
  MUNIS
- ➤ Locks the MUNIS database
- ➤ Prompts for a tape
- ➤ Backs up the MUNIS database
- ➤ Verifies the database backup (from step above)
- ➤ Prompts for 2nd tape
- ➤ Backs up the system
- ➤ Verifies the system backup (from step above)
- ➤ Prompts for another tape (if using tape archive option) and exports the MUNIS
  database to the tape (or to the hard drive if using the hard drive archive option)
- ➤ Removes the existing MUNIS database and imports the MUNIS database from tape
  or hard drive (depending upon the option selected)

Running the MUREFRESH utility

Complete the following MUREFRESH steps prior to upgrading to 2003/2003.01. **Performing
the MUREFRESH is critical!**

> If not currently logged in as root, login as root
> Make sure you are connecting to the RS6000 from a PC terminal.
> At the "$" prompt, type:
> **export TERM=vt100** (press enter)
> **cd   /fms**   (there is a space between the cd and /) (press enter)
> **ksh   murefresh** (there is a space between ksh and murefresh) (press enter)

<div align="center">

*****IMPORTANT*****

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*All instructions for running the utility will be displayed on the monitor/screen. Make certain to
read ALL instructions and respond yes (y) to prompts. Before beginning the following steps of
installing the 2003/2003.01 Release, there will be a prompt to "LABEL THE TAPE".*
PLEASE NOTE….   *LABEL THE TAPE AFTER THE PROCESS IS COMPLETED not at the
point that the message is displayed.*

*When you are back at the root prompt ($), you have completed your initial MUREFRESH.
Please continue to install the 2003Major Release and 2003.01Maintenance Release.*

HELPFUL HINT: *If you log into the RS6000 and the screen is wrapping "funny" or you just
can't read it, you need to set your terminal type by typing* **__export TERM=vt100__**.

Installing the MUNIS 2003/2003.01 Release

While still logged in from a PC to the RS6000
At the root "$" prompt, type:
cd /fms (there is a space between the cd and /) (press enter)
then type **ksh 2003upgrade** (there is a space between the ksh and 2003) (press enter)

Respond yes to all prompts or press enter if indicated...... including replacing the menu.   When 2003.01 finishes, you will be prompted to press RETURN to continue the process. From there, select yes at the prompt for MUCOPY (in order to keep your test database current). At the prompt to "Remove unused files from the test system", answer YES.

After the complete installation of the MUNIS 2003/2003.01 Release, (where it says ***Copy Complete***) you will need to update the banner in your test system. From the MUNIS main menu, select (2) MUNIS **test** system, then **highlight the ADMIN option** displayed at the top of the screen or press the ALT key and the letter A(ALT-A) to select the ADMIN pull down menu. From the ADMIN pull down menu, select the options:
  General Admin then...........
    System Parameters F/M then.......
      Update the Client Name to reflect the test system (e.g., ****DISTRICT TEST SYSTEM****)

MUNIS recommends that you run the MUREFRESH utility a second time, after the 2003/2003.01 release is installed. To run MUREFRESH the second time

(still at a PC logged into the RS6000)
At the root "$" prompt, type
ksh murefresh

Release Notes – *MUNIS Major Release 2003 and Maintenance 2003.01 Release Notes are located on the KDE and MUNIS Websites.*

If you have any problems with this update, please call the School Information Technology Services at **(800) 884-1754.**

Adding a Workstation to the Host on the RS6000

This step creates an entry into the RS6000 hosts file for each workstation/user login requiring access to Munis Office. The steps listed establish an entry into the "hosts" table:

1. Login to the RS6000 server as "root" at the console.

2. At the **$** prompt, type the following:

    smit tcpip　　　　(Press **Enter**.)

    This will bring up the TCP/IP screen.

3. Select the **Further Configuration** option on the TCP/IP screen.

4. Select the **Name Resolution** option on the Further Configuration screen.

5. Select the **Hosts Table** option on the Name Resolution screen.

6. Select the **Add a Host** option on the Hosts Table screen.

   The following screen is displayed:

```
 Session    Edit    Commands    Settings    Help
─────────────────────────────────────────────────────────────────
──────────────────────── Add a Host Name─────────────────────────
Type or select values in entry fields.
Press Enter AFTER making all desired changes.
                                         [Entry Fields]
* INTERNET ADDRESS (dotted decimal)              []
* HOST NAME                                      []
  ALIAS(ES) (if any - separated by blank space)  []
  COMMENT (if any - for the host entry)          []

F1=Help F2=Refresh F3=Cancel F4=List Esc+5=Reset Esc+6=Command
Esc+7=Edit Esc+8=Image Esc+9=Shell Esc+0=Exit Enter=Do
```

7. Using the **down arrow key** to navigate, enter the following information on the Add a Host Name screen:

Field	Description
Internet Address	**Enter the IP address of the target workstation.**
Host Name	**Enter login name of the individual using the workstation.**
Alias(es)	**Leave blank.**
Comment	**Optional entry.**

8. Press **Enter** to complete the process of adding a host name.

9. After the processing is complete, press the **F3 key twice** to go to the Hosts Table screen.

10. Select the **List All Hosts** option on the Hosts Table screen to verify that the host you added is now listed. If the host is not listed, repeat the steps above.

11. After the host name has been added, repeat the process to add additional workstations/user logins or press **F3** until you have exited **smit**.